16-1

DOH Vendor System: Products

Objectives

Product Overview

Adding A Product

Evaluating a Product

Add a Product Group & Category

Adding Categories to a Group

About New Products

Due to variations in existing business practices (relative to the introduction and testing of new products) among managing groups (M&T, Utilities, Signing and Traffic), there is no single all-encompassing list of products. Additionally, there is no established standard in which products are processed, approved, and added to the Approved Products list (available via the web).

Currently, the New Products Coordinator must request updated lists of Approved Products from each group (M&T, Utilities, Signing and Traffic) on a regular basis. He then composes a complete list of approved products manually. As some rejected products are never entered into the DOH Vendor system, it becomes very difficult to track the history of products that get re-submitted by the Producer.

Therefore, a new process has been implemented using HiCAMS to maintain a master list of products, while still allowing individual managing groups to maintain control over the evaluation and approval of products within their group.

Authorized Users

New Product Committee Member - View, Create a New Product, Update Product Detail Info, Add Evaluators, Update Evaluator Recommendations, Add Update Approval Responsibility, Add/Update Groups, Add/Update Categories.

Materials Operations Engineer – The same rights as New Product Committee Member, with exception of Create New Product.

M&T Lab Supervisor - View, Update Product Detail Info, Add Evaluators, and Update Evaluator Recommendations.

M&T Assistant Lab Supervisor – The same rights as Lab Supervisor.

All Other HiCAMS Users – View, Update Evaluator *Recommendation* and *Comment* fields.

Navigation

DOH Vendor® Functions® Producer/Suppliers® Products

Life Cycle of a New Product

The New Product Coordinator receives information about the new product.

The New Product Coordinator enters the information into the DOH Vendor System's **Products** module, adding information to the **General**, **Contact** and **Product Detail** and **Manufacturer's Testing** tabs.

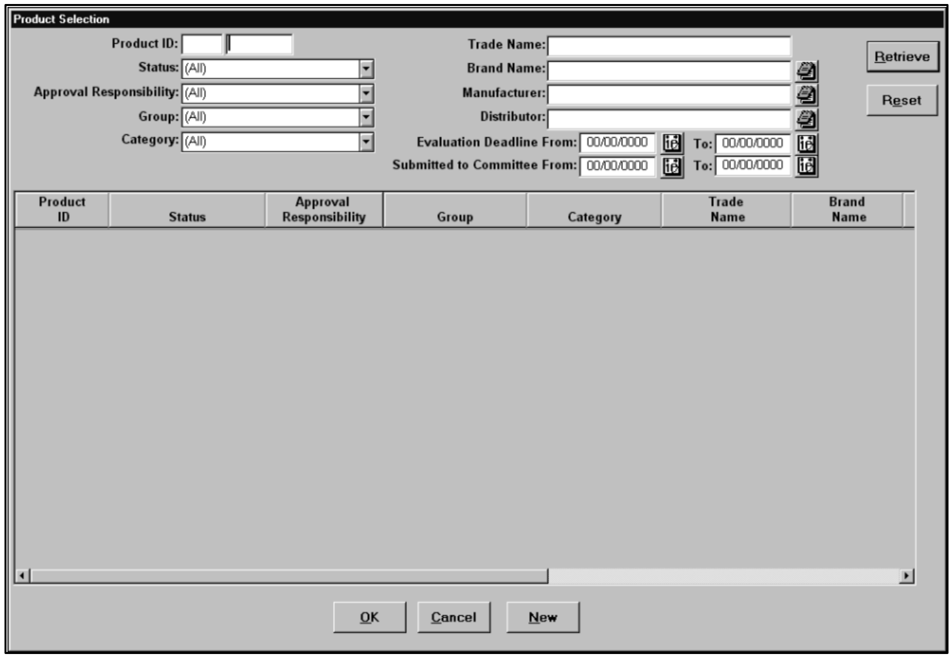
The new product is assigned to the group that the product falls under, such as Utilities, Traffic & Signing, or Materials and Test.

A notification will be sent to the appropriate group of Evaluators that product(s) have been assigned to them for evaluation. (Status = Under Evaluation).

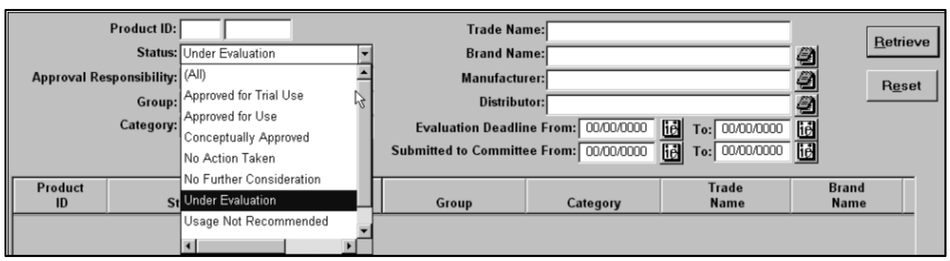
The group or individual investigates the product over the period of time allotted and decides whether or not it should be Approved For Use.

Searching for a Product

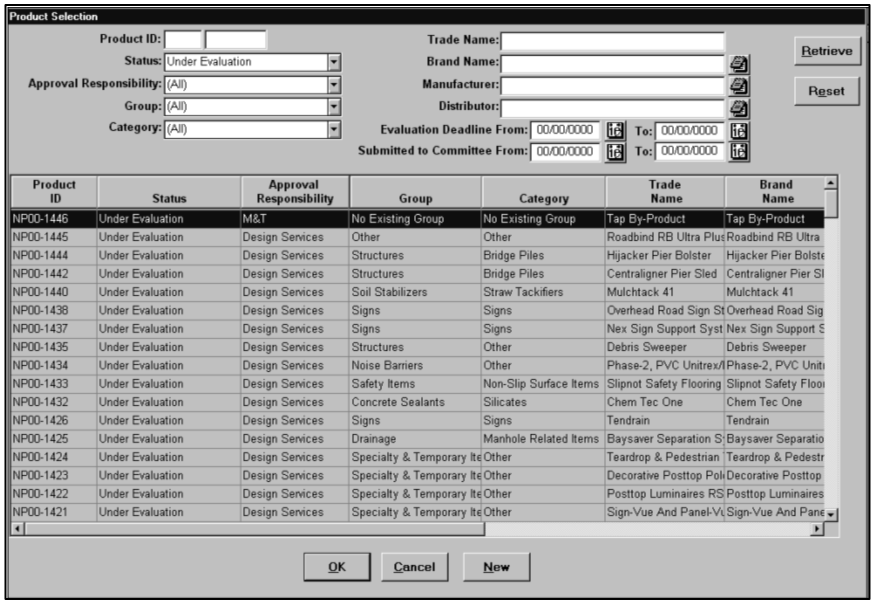
Step 1: To search for an existing product, click **Functions→Producer/Supplier→Products**. The **Product Selection** window displays:



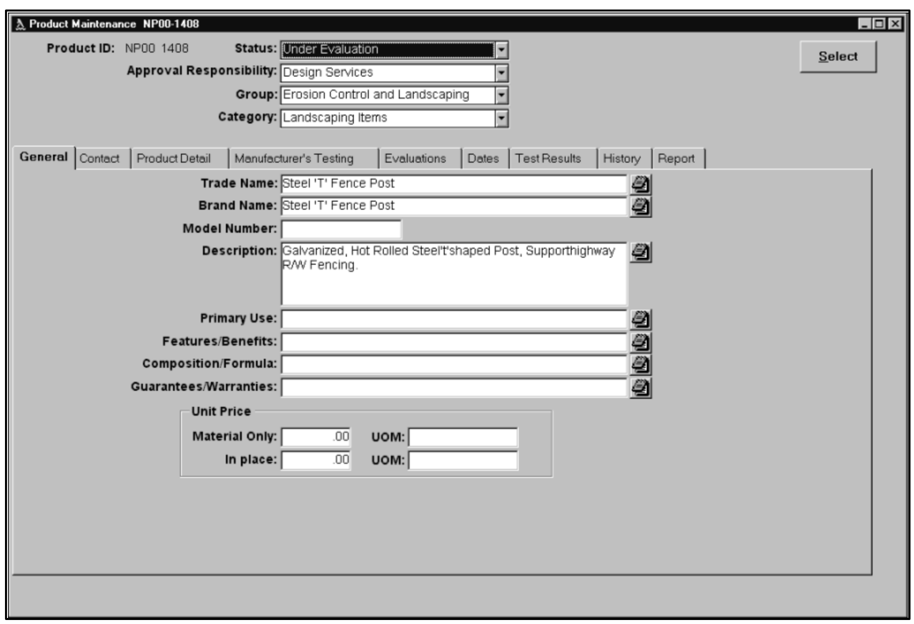
Step 2: Using the various filters, you may search for an existing product. For example, to search for all products that are currently under evaluation, you may use the *Status* field, and select "Under Evaluation":



Step 3: Click **Retrieve**. The **Product Selection** window will display the list of all products currently set to this status:



Step 4: Scroll through the list to locate the specific product, using the Click / Sort functionality (click the header of the column you would like to sort the list by), if necessary. Select the appropriate row and double-click or click **OK**. The **Product Maintenance** window displays:

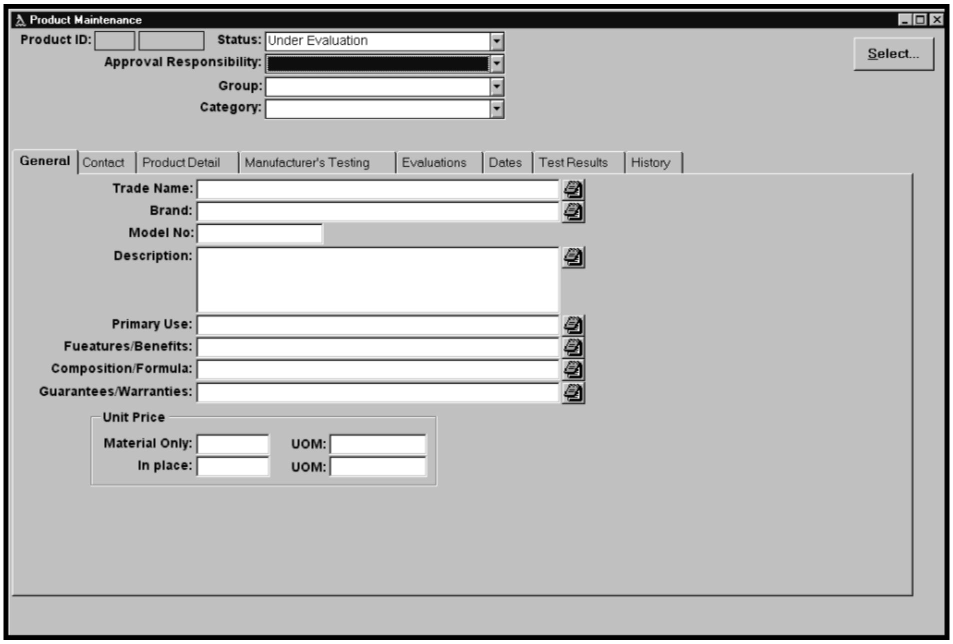


Note: *Only the New Product Coordinator and Materials Operation Engineer have the security rights to update information. All other users are "inquiry only".*

Adding a Product

Currently, only the New Product Coordinator may add a new product.

Step 1: Click the **New** button. The **Product Maintenance** window displays:



Step 2: Select the status of the new product, which will typically be "**Under Evaluation**".

Step 3: Select the group who is ultimately responsible for approval of the new product from the **Approval Responsibility** drop down menu.

Step 4: Select the product group from the **Group** drop down menu.

Step 5: Choose the category for the new product by selecting from the **Category** drop down menu.

Step 6: Add the necessary information to the **General** tab:

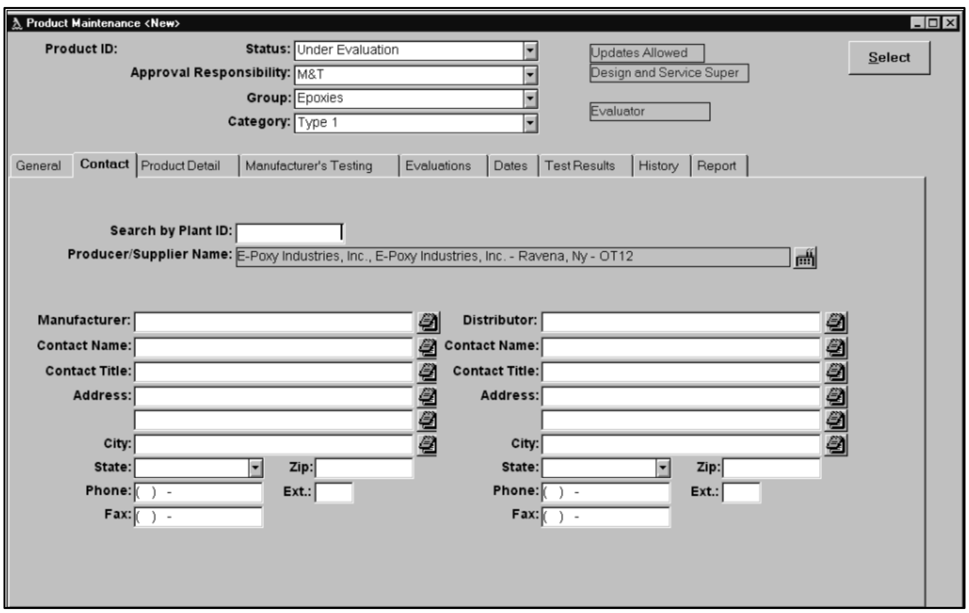
- Enter the *Trade Name* in the appropriate field (required).

- Type the brand name of the new product in the *Brand Name* field (required).
- Type a description of the new product in the *Description* field.
- Complete all other fields as applicable.

Step 7: Click the **Contact** tab, and enter the Producer / Supplier info.

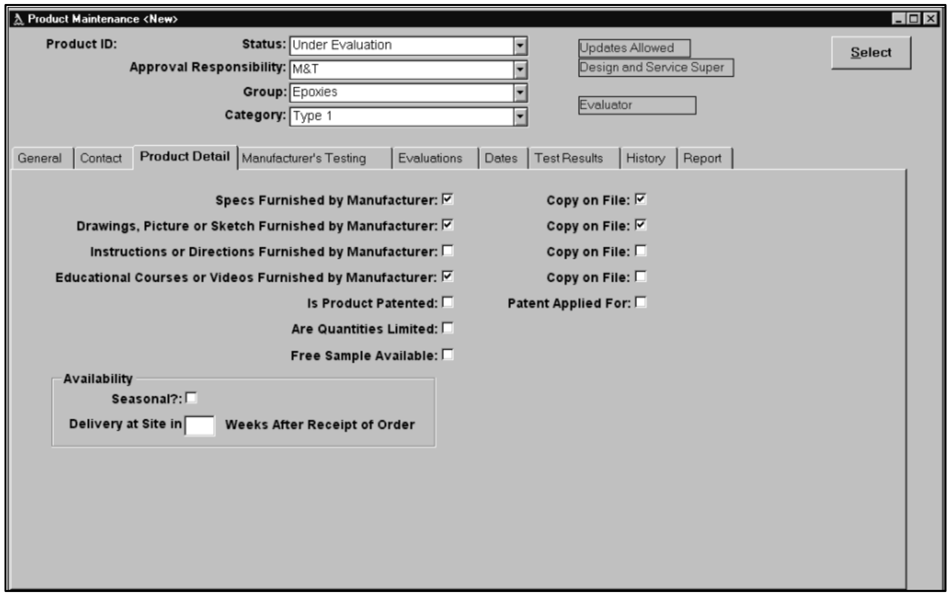
Tip: *If the Plant ID is known, enter this number and HiCAMS will populate the Producer name automatically if the Producer exists within Vendor.*

If the Producer / Supplier is not currently in Vendor, then enter the Manufacturer information in the lower section of the window:

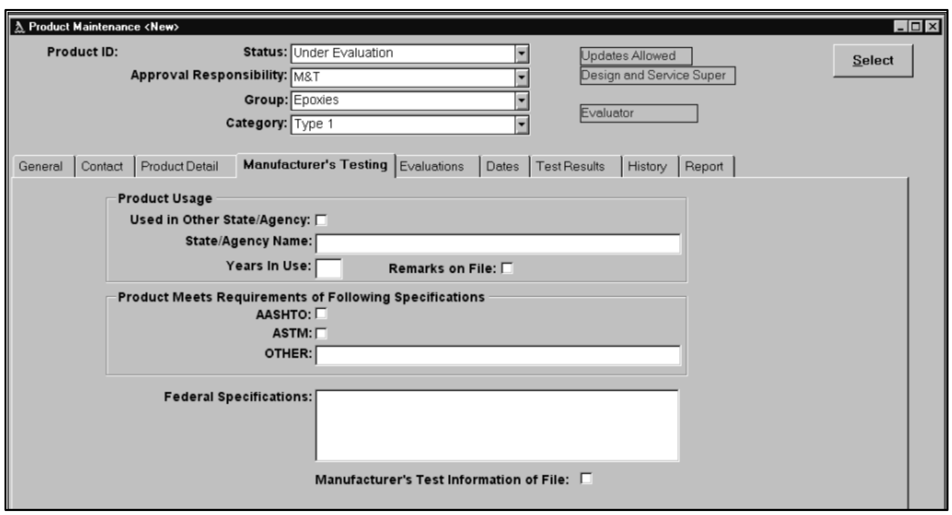


Note: *If only the salesperson name is known, enter this information in the Distributor section.*

Step 8: Select the **Product Detail** tab. Check any items that apply, based upon the Producer's information packet:



Step 9: Select the **Manufacturer's Testing** tab. Check any items that apply, based on the Producer's information packet:



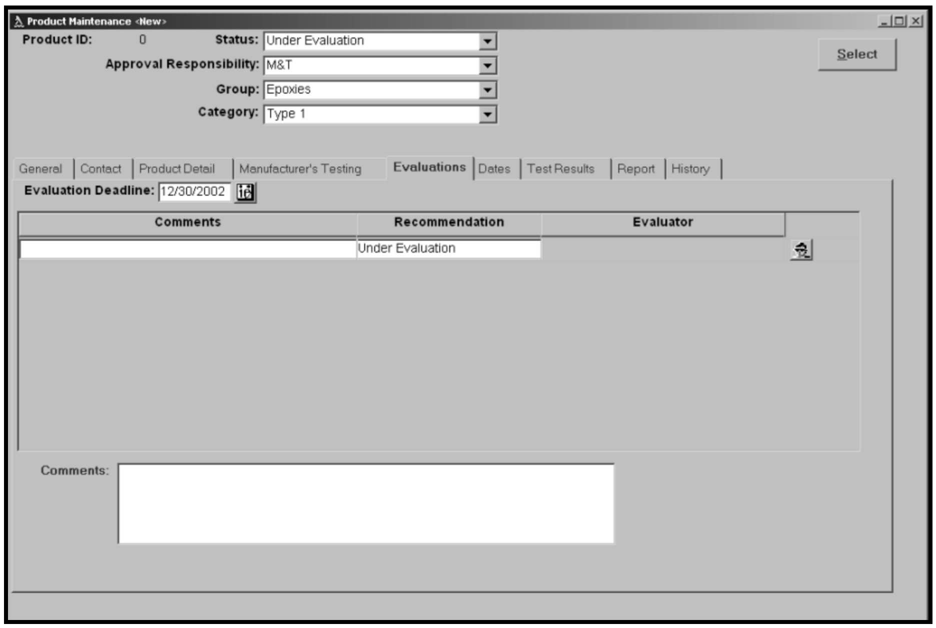
Note: *If the "Used in Other State Agency" checkbox is checked, then the State Agency name is required.*

Step 10: Click the **Evaluations** tab.

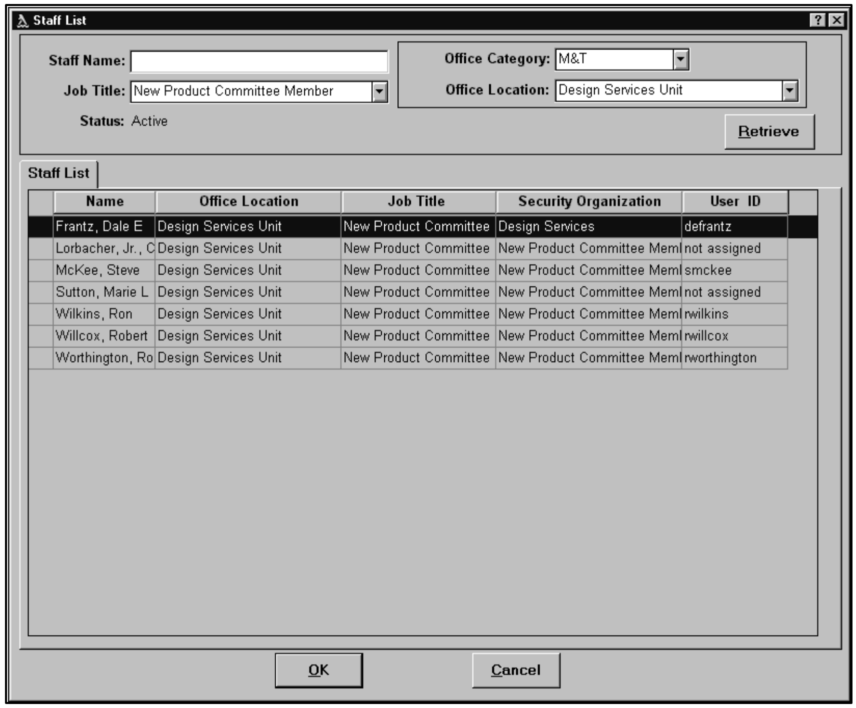
Step 11: Enter the **Evaluation Deadline** date by entering the date, or clicking the calendar icon.

The *Evaluation Deadline* is required prior to entering Evaluator names. This date will be used to send a reminder notification to each evaluator if they have not recorded a recommendation within 1 month of the deadline.

Step 12: To enter evaluators, click the Insert icon on the toolbar. A blank row will appear, and the Status will default to "Under Evaluation":



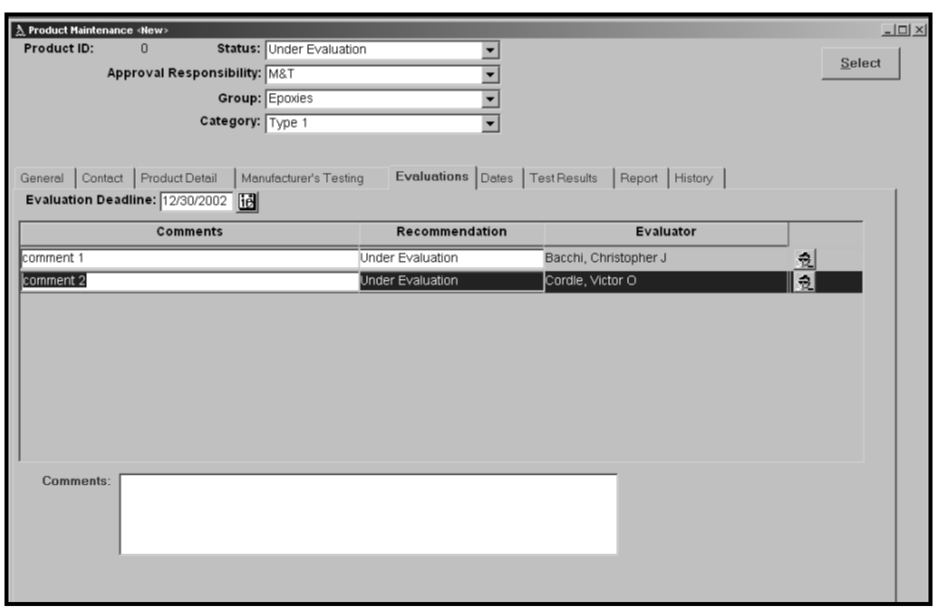
Enter the evaluators that are responsible for the product by clicking the Staff icon next to the field. A search window will display:



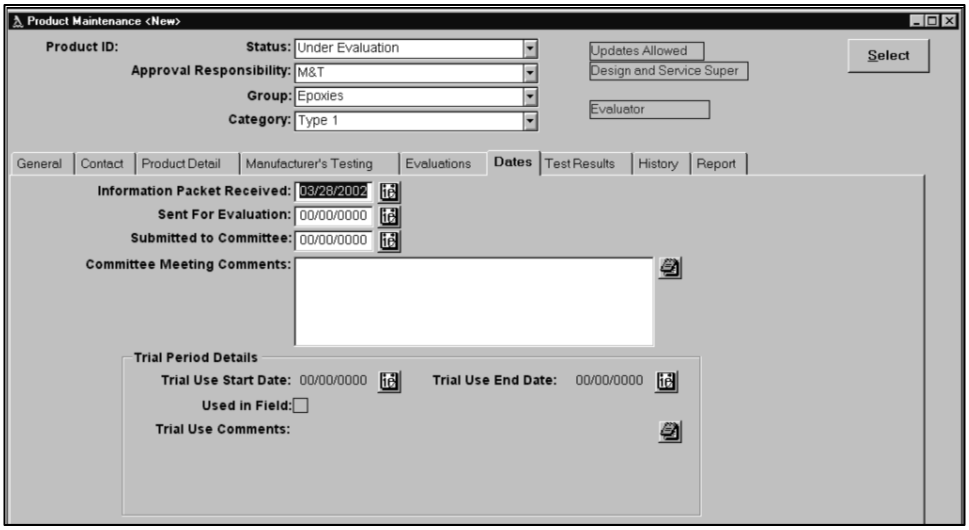
Step 13: You may enter the staff name, or simply use the available filters and click **Retrieve**. The staff name will populate in the field.

Step 14: Enter a comment, if necessary.

Note: *Multiple evaluators may be assigned by clicking the Insert icon each time a blank row is needed. Each row entered may have an individual comment applied for the evaluator, which is visible in the Comment section in the lower portion of the window, when that row is clicked:*



Step 1: Click the **Dates** tab. The *Information Packet Received* field will default to the current date. If the packet was received earlier, this date can be updated:



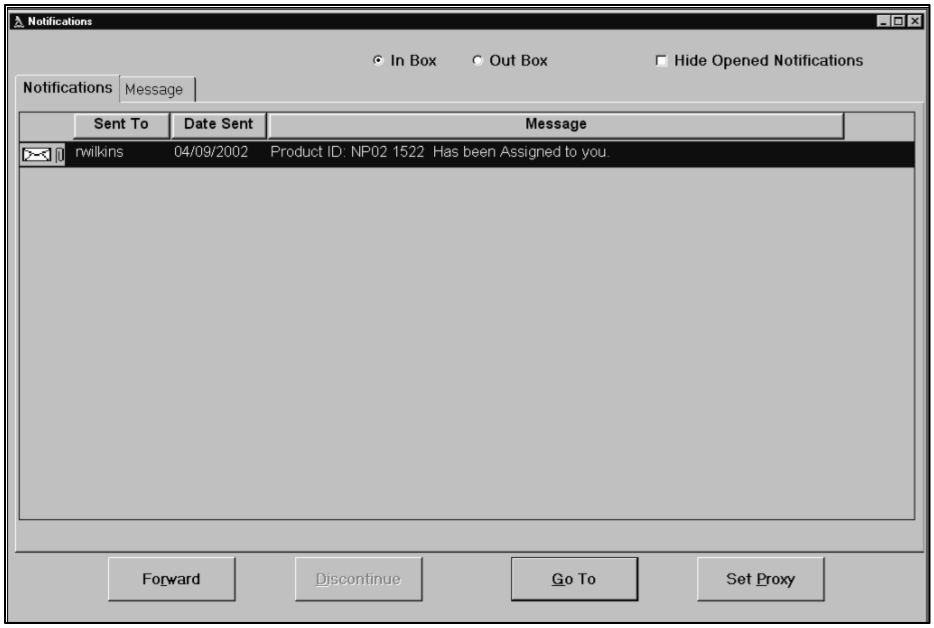
Step 15: Enter the *Sent for Evaluation* (date hard copies sent to evaluators) and the *Submitted to Committee* dates (date of Committee meeting to discuss this product).

Step 16: Click the **Save** icon on the toolbar. A notification will be sent to each evaluator listed on the Evaluator tab, to notify them that they have been designated as an evaluator for that product.

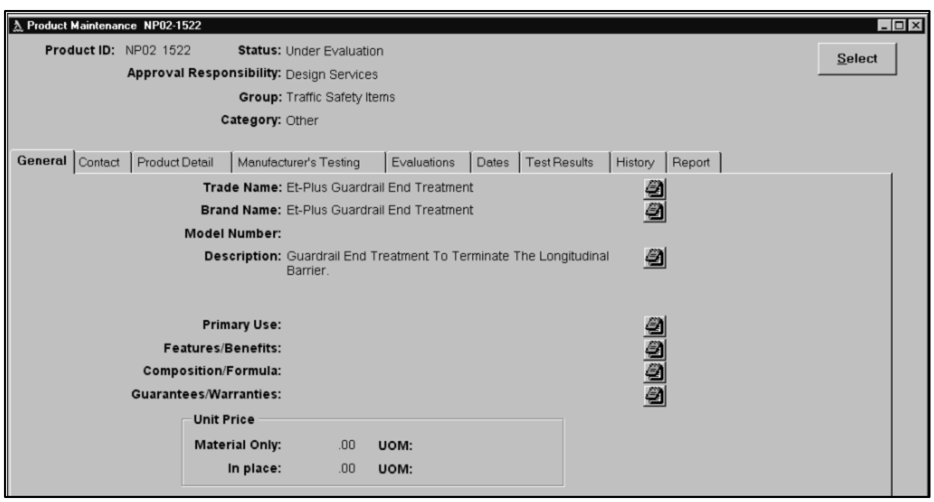
Evaluating a New Product and Making a Recommendation

The individuals who have been assigned the responsibility for the evaluation of the product receive a Notification that a product is available for evaluation.

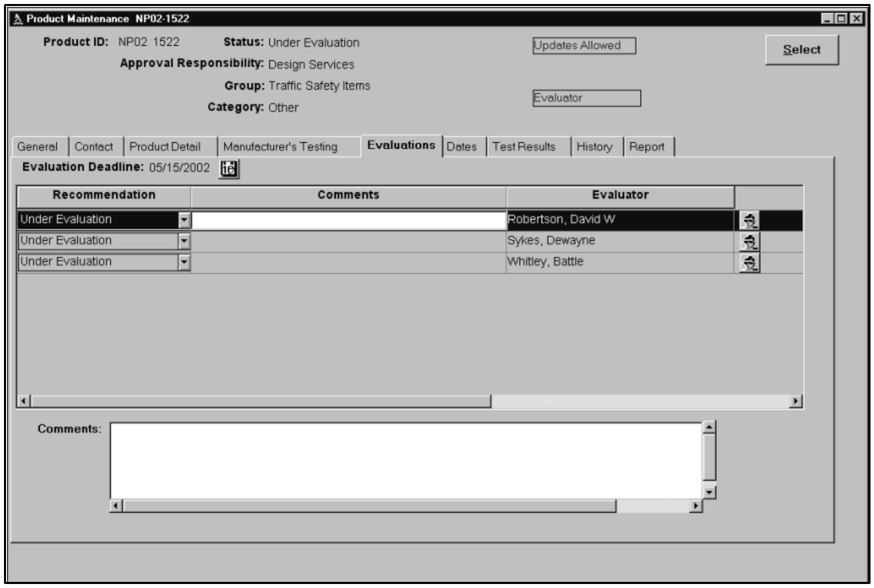
Step 1: In the DOH Vendor System, click the **Notifications** icon to display the list of notifications:



Step 2: Select the Product Review item from the list of **Notifications** and click the **Go To** button on the bottom section of the window. The **Product Maintenance** window displays:

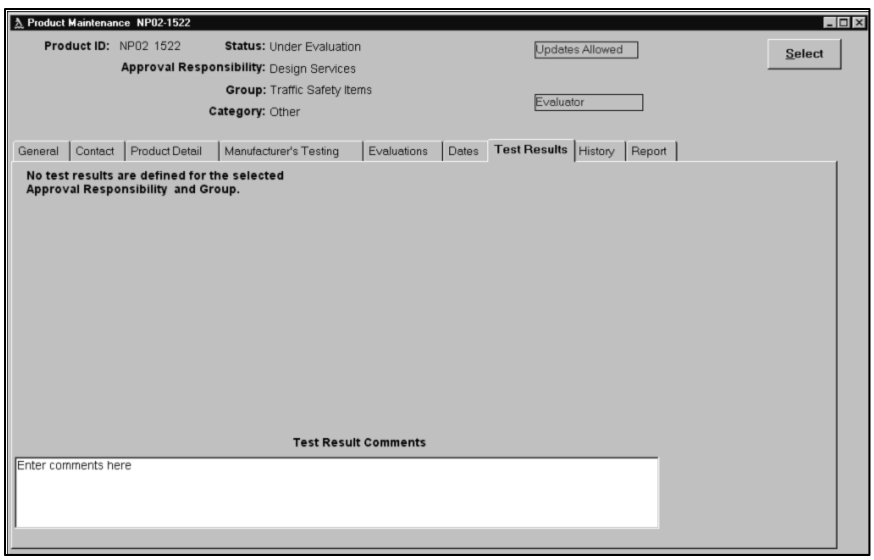


Note: *Due to security assignments, only the New Product Coordinator may update all tabs on the Product Maintenance windows. Those users designated with the job title of "Evaluator" may make comments and change the Status on the Evaluator tab, and enter results on the Test Results tab only: After reviewing the product, the Evaluator will enter comments and make a Recommendation by changing the status accordingly. Comments that exceed the space provided in the row will be displayed in the lower portion of the window:*

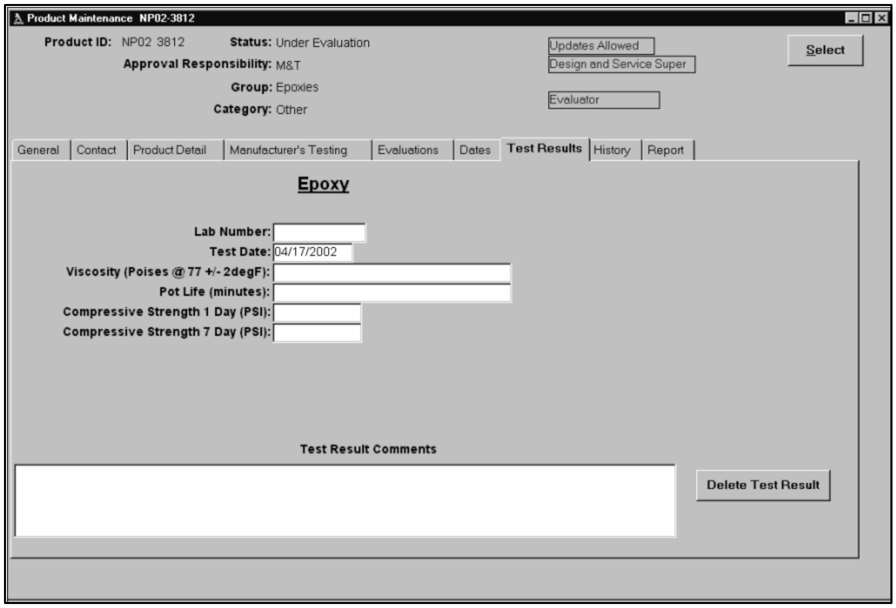


Step 3: If appropriate, enter test results on the **Test Results** tab.

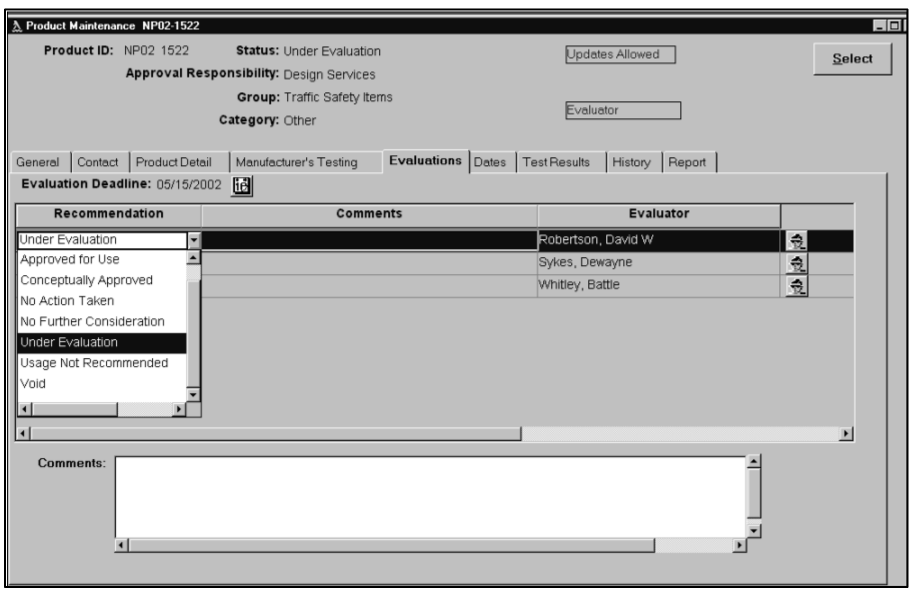
Note: *If there is a Test Format for the product, space for entry of test results will appear on the Test Results tab. Otherwise, simply enter Comments:*



The following is an example of the **Test Results** tab for a product with a Test Format:



Step 4: In the **Evaluation** tab, select the appropriate status from the drop down list:



Step 5: Click the **Save** icon. Recommendations are saved and a comment is written to the **History** tab.